

# 1 Kick-Off Meeting

**WHO::** Hosted by the CalREDIE team; LHD participants

**WHAT::** This is a one hour webex meeting with CalREDIE and LHD staff to familiarize the LHD with the implementation process. Topics covered include:

- Demo of the Provider Portal (from the reporter perspective)
- Steps on recruiting and training reporters

The recruiting and training of reporters is done by LHD staff.

The CalREDIE team provides several resources to help with this effort:

- Provider Portal Factsheet –this is a one page document for reporters that provides a high level overview of what the provider portal is.
- Provider Portal Quick Start Guide – this is a two-page, front and back, document that provides instructions for reporters on how to submit a report via the Provider Portal.
- Provider Portal Training Slides – this is a PowerPoint presentation that can be used when training reporters.

## Setting up reporter accounts

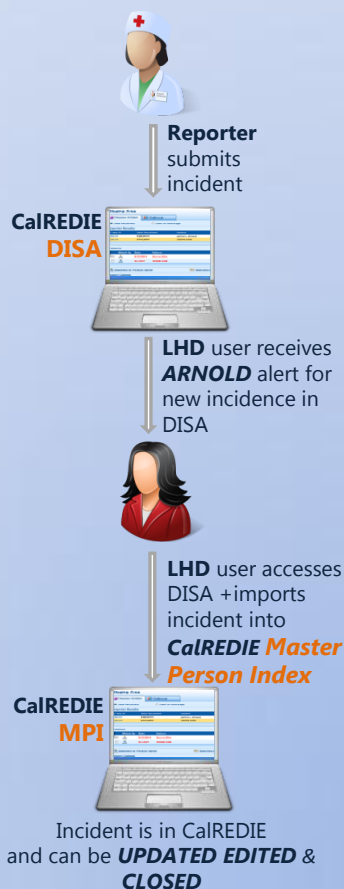
Setting up the reporter accounts is a joint process between the Reporter, LHD and CalREDIE Helpdesk. It is a 4 step process.

1. The reporter completes the Reporter Authorization form and submits to LHD.
2. The LHD confirms that the reporter should be given an account and verifies that the correct Report Source(s) exists in the Report Source dictionary\*
3. The LHD submits the Reporter Authorization form to CalREDIE Help.
4. CalREDIE Help creates the reporter account and emails the reporter his or her username and password. The Helpdesk also emails the PP liaison to inform him or her that the account has been created.
5. \*Each reporter account is linked to an entry(s) in the Report Source Dictionary. A reporter account can be linked to up to 5 different Report Sources. These are the Report Sources that the reporter reports on behalf of.

# 2 CalREDIE DISA Training

**WHO::** Hosted by the CalREDIE team; LHD participants

**WHAT::** This is a one hour webex meeting with CalREDIE and LHD staff to train the LHD staff on using the Disease Incident Staging Area (DISA). After the training, LHD staff can obtain a username and password for the practice provider portal so that they may practice submitting reports to CalREDIE and then importing the reports from the DISA.



# 3 Outreach & Go Live

**WHO::** LHD representatives recruit and train their selected reporters

**WHAT::**

## Selecting Reporters

Typically, each local health department identifies 3 – 5 facilities or clinics to start with. If necessary, a facility or clinic can have multiple reporters report on its behalf. We recommend selecting reporters that you already have a working relationship with (i.e. hospital ICP) and that you know will be good partners in implementing the portal. Starting with a limited number of reporters allows the local health department to become comfortable with the recruitment and training process as well as comfortable using the Disease Incident Staging Area (DISA).

## Going Live With the Provider Portal

After the LHD has participated in the Kick-Off meeting and the DISA training, they are free to begin using the Provider Portal. After the initial reporters begin using the portal, it is up to the local health department on how quickly additional reporters are brought on. Some local health departments move quickly and bring on several new reporters each week, others move more slowly and add only a handful of reporters each month.